

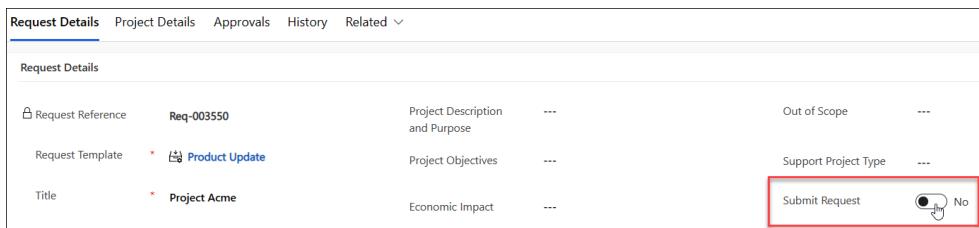
# Request Form Details

## Request Tabs

### Request Details

The Request Details tab contains fields relevant to moving the request process forward as well as fields that will be copied over to the related new project that eventually gets created.

After the Requestor clicks the **Submit** switch on the Request Details tab, an email with request details will be sent to the Request Submitter, Approvals Coordinator and the nominated Approvers.



The screenshot shows the 'Request Details' tab with the following fields:

- Request Reference: Req-003550
- Request Template: \* Product Update
- Title: \* Project Acme
- Project Description and Purpose: ...
- Project Objectives: ...
- Economic Impact: ...
- Out of Scope: ...
- Support Project Type: ...
- Submit Request button (highlighted with a red box)
- No radio button (highlighted with a red box)

**Note** When the back arrow is clicked while on the Request Details tab, the Request form will reload rather than load the view or record from which you opened the request record.

**Caution** When creating a request, if you save the record after only giving it a name and not assigning a template, you will receive an error message, and the request will not be usable and will need to be recreated.

### Project Details

The **Project Details** tab in Requests will be visible for users given the **BrightWork Team Member** security role.

The values for the following fields in Project Details can be specified in the Project Template and will automatically populate the corresponding columns in the Project Details tab of new Requests:

- Content Template
- Portfolio
- Program
- Project Manager

- Project Sponsor
- Project Type

Project Acme - Saved  
Request · Product Update

Request 2 Approvals  
Active for less than one mi...

Draft (< 1 Min) Accepted

Project Details

Request Details Approvals History Related

Project Template	* <a href="#">Product Update</a>	Project Name	---	Project
Content Template	<a href="#">Content Template from Danista Proj...</a>	Project Manager	<a href="#">Anne Wallace (Offline)</a>	Project Created
Submit Date	---	Project Sponsor	<a href="#">Alex Hankin (Offline)</a>	
Group Manager	---	Portfolio	<a href="#">ACME Portfolio</a>	
		Program	<a href="#">ACME Program</a>	
		Project Type	Strategic	

## Approvals

**Tip** Also see the [BrightWork Approvals](#) article for info about a dedicated Admin Area section to manage Request and Project approvals.

The **Approvals** tab in Requests will be visible for users given the **BrightWork Approvals Coordinator** security role.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the Approvals tab. The default settings are controlled by the configuration that is set in [Templates Area | Request Templates](#).

Project Acme - Saved  
Request · Product Update

Request 2 Approvals  
Active for less than one mi...

Draft (< 1 Min) Accepted Approved

Approvals

Request Details Project Details Approvals History Related

Approvals Detail

Approvals Coordinator\* [Jonathan Weisglass \(Busy\)](#) Request Template\* [Product Update](#) Auto-create Project

**Draft to Accepted**

Approvers [Caitriona O'Connor](#) Additional Approval Email Text Approval Start\*  
 Manual

**Accepted to Approved**

Approvers [Donal McCarthy](#) Additional Approval Email Text Approval Start\*  
 Automatic

## Approvals Coordinator

The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals

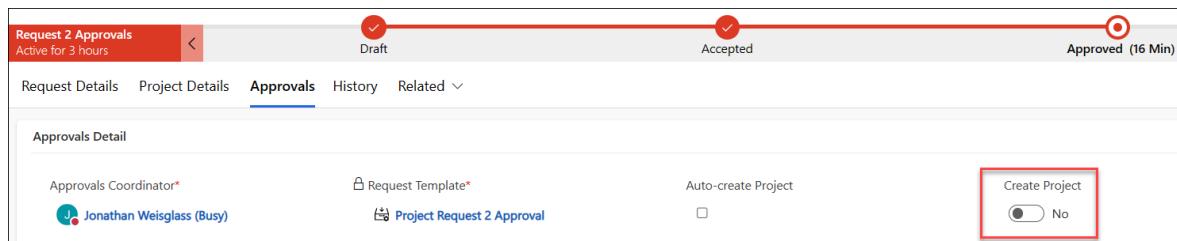
Coordinator in the Request Template.

The Approvals Coordinator does not make approval decisions; all stage approvals are done by the nominated Approvers. The Approvals Coordinator also does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be sent approval related notifications.

## Create Project

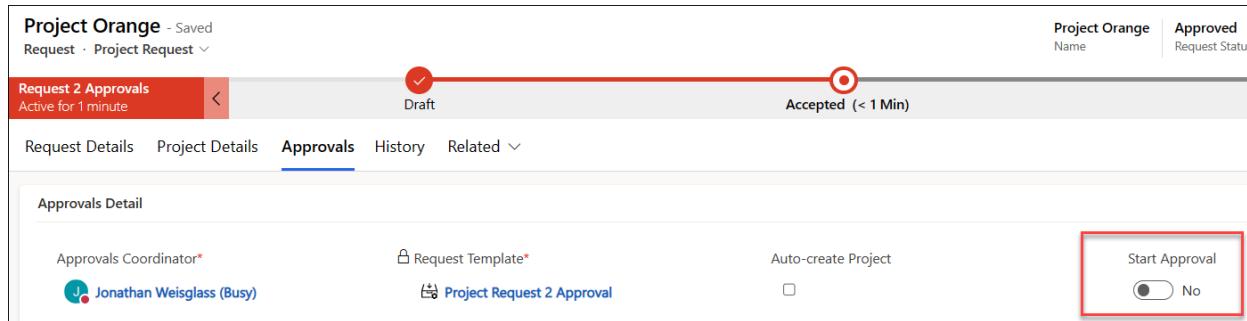
The **Create Project** toggle button will appear in the Approvals tab of a request that has been configured to not auto create projects. The Approvals Coordinator can toggle the button to create a project when the button becomes enabled.



## Approval Start

If **Approval Start** is set to **Automatic**, the approval process starts as soon as the previous approval gets approved.

If **Approval Start** is set to **Manual**, the Approvals Coordinator gets notified that they have an approval to manually start after the previous approval gets approved, and the **Start Approval** button on the **Approvals** tab will become enabled.



## History

The History tab displays a history of the approvals process.

Request 2 Approvals < Draft (24 Hrs) Accepted

Request Details Project Details Approvals History Related

<input type="checkbox"/>	Name	Stage	Outcome	Date ↑	Comment
	Jonathan Weisglass	Draft to Accepted	Submitted	1/24/2023 8:42 ...	Request Submitted
	Anne Wallace	Draft to Accepted	Approve	1/24/2023 8:45 ...	
	Dan Bacon	Draft to Accepted	Approve	1/24/2023 8:47 ...	